



ANDERS BUSINESS TRANSITION PLANNING

POSITIONING YOUR COMPANY FOR WHAT'S NEXT

Whether building your business to sell or to leave a lasting legacy, at some point you will ask “what do I want to do next?” From startup businesses to multi-generational companies, each owner has a unique need for value planning to ensure personal and financial readiness for the next stage of life — whether a new business venture or retirement.

CONTINUOUS BENEFITS OF BUSINESS TRANSITION PLANNING

To reap continuous benefits, business transition planning is an ongoing process that should begin long before you are actually ready to transition your business. If you think of it, you really spend your entire business cycle planning to transition in one way or another. Business transitioning can help:

- Control how and when to transition in your business
- Minimize taxes to put more money in your pocket
- Implement strategic options to choose from during any life event
- Maximize value during good and bad economic times
- Create peace of mind knowing your future is secure

UNLOCK THE WEALTH OF YOUR COMPANY

A successful business transition strategy can increase annual income and the value of the enterprise. It pushes the team to be the best-in-class business and will serve the owner as a contingency plan. Non-solicited offers do happen, so it is important that your business is prepared when an opportunity arises.

OUR PROCESS

The Anders group of Certified Exit Planning Advisors (CEPA) use a proven team process that focuses on value growth and the alignment of your business, personal and financial goals. Our business transition planning services include:

- Exit and Succession Plans
- Business Owners Contingency Plans
- Business Valuations
- Keep or Sell Testing
- Value Drivers Analysis
- Profit Building Analysis
- Due Diligence for Buyers and Sellers
- Tax and Estate Planning for Exiting Owners
- Personal Financial Planning
- Risk Management/ Insurance Planning
- Wealth Transfer Planning
- Post Sale Transition Planning

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TALK WITH AN ADVISOR TODAY.

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